

# D3.3 - Virtual training programme on upgrading administrative skills

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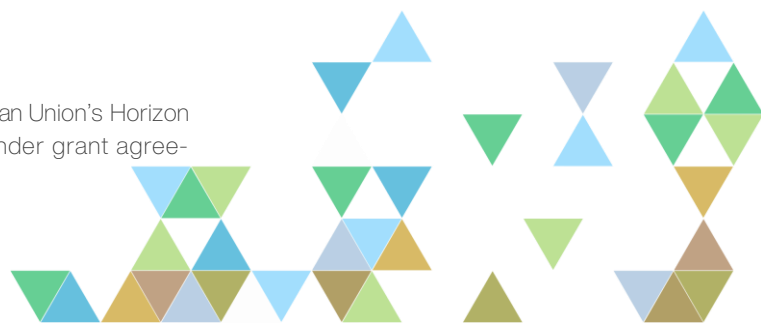


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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 952051





## Technical References

<b>Project Acronym</b>	SOILdarity
<b>Project Title</b>	Stepping up and bringing out the scientific excellence and innovation capacity in soil research of the University of Lisbon
<b>Project Coordinator</b>	FCIENCIAS.ID - ASSOCIACAO PARA A INVESTIGACAO E DESENVOLVIMENTO DE CIENCIAS (FC.ID)
<b>Project Duration</b>	36 months (1 <sup>st</sup> September 2020 – 31 <sup>st</sup> August 2023)



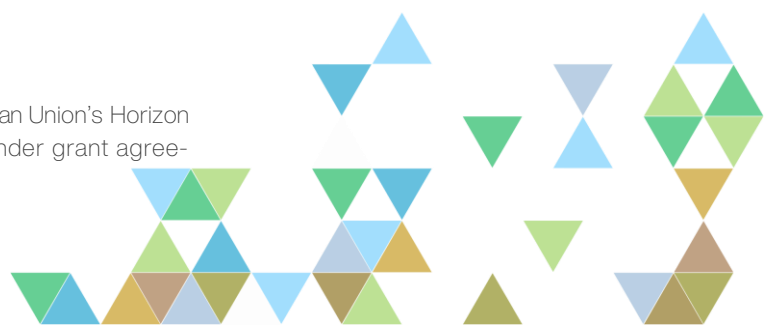
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V0.2	28/10/2021	EUKNOW	Gabriele Quattrocchi



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## Summary

This document describes how the specialized virtual training on upgrading FC.ID or CIÊNCIAS's staff's administrative skills will be implemented. The course is aimed at providing participants with comprehensive knowledge to effectively deal with the management of projects funded by Horizon Europe. This document specifies the segments of the courses, the dates when each module will take place, to whom they are addressed, and who will be responsible for the organisation.

The course will briefly present the main features of the new Horizon Europe program, it will analyse the principles and operational techniques to address the management and reporting of projects, taking into account the application problems of universities and public research institutions. The legal framework of reference will be examined, together with the individual phases of project management, the economic and financial administration of the budget and the control and monitoring system. The new features that characterize Horizon Europe compared to the previous programme will be highlighted.



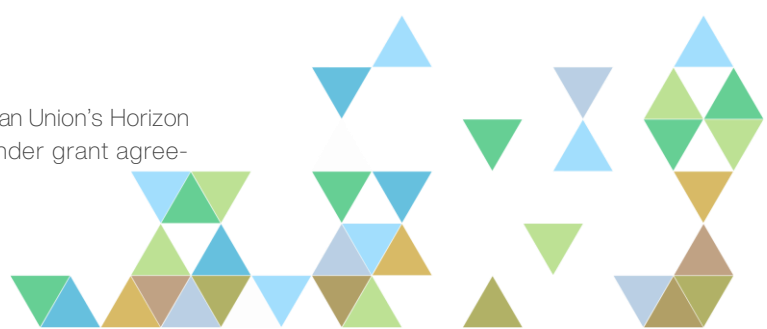


## Spelling Guidelines

Standardised British spelling should be used in the document. Generic terms are spelled in lower case, specific terms and proper names are spelled with initial capitals.

## Disclaimer

This publication reflects the author's view only and the European Commission (EC) is not responsible for any use that may be made of the information it contains.



## 1. Deliverable 3.3

### 1.1 Aim and expected output

The objective of this document is to set up a course of actions to improve the administration skills within FC.ID and CIÊNCIAS.

The two entities have an administration unit supporting the implementation of international and national research and innovation (R&I) projects on many levels:

- Organisational and logistical: management of resources, personnel, goods and services, including equipment to ensure the implementation of projects, training courses, trials, pilot tests etc.
- Administrative: management of the bureaucratic burden, relations and formal communication with internal and external stakeholders, including the contract obligations with donors and grant providers;
- Financial: budget estimation, reporting, requests for certifications of financial statement.

The management of these aspects can be challenging for staff members of research organisations. There is the need to foster management and administrative skills of the persons working in this sector, as the requirement for accessing and managing R&I grants may vary according to several variables, and research entities should not take for granted the readiness of the administrative personnel in managing projects, especially EU and international joint actions where different barriers may arise.

The programme which this document describes aims to strengthen the administrative capacity of FC.ID and CIÊNCIAS, notably of the personnel working in the Grant Management Unit.

The expected output of this course is the increase the level of awareness of the relevance of the administrative work in effectively implementing research actions and the consolidation of skills in particularly managing Horizon Europe projects, by also comparing it to Horizon 2020.

### 1.2 Roles and responsibilities

EUKNOW will coordinate a set of 3 virtual training seminars, which will be held in November 2021, January and June 2022.

MIGAL and UGENT will support the activities and share their experience and good practices on financial reporting under H2020 and Horizon Europe rules, accountability, budgeting issues, payrolls, organizational aspects of project-related events and activities.

EUKNOW will prepare, present and share the material supporting the web seminars. The material will be released after each module.

### 1.3 Target Audience

FC.ID and CIÊNCIAS administration unit's staff is the main target audience of the virtual training seminars, especially workers involved in the management and reporting of research



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projects, notably with experience in European projects: 9 International project managers, 6 from FCID and 3 from CIÊNCIAS.

Researchers from FC.ID and CIÊNCIAS will also be invited to attend as several topics would affect their daily activities in the preparation of the project proposals and grant applications. The topics that will be presented to the researchers will be cross-cutting, thus the researchers do not have to meet any particular requirements to join the modules. The topics that will be presented to researchers will regard the policy priorities and determinants behind a call for proposal, the Destinations in Horizon Europe, the internal organisation, communication between departments and researchers, the data management plan, communication, dissemination and Open Science in Horizon Europe.

The participation of the researchers would also contribute to fostering and consolidating the dialogue between researchers and administrative staff.

**Requirements:** Basic knowledge of the procedures related to the management and reporting of research projects under research and innovation framework programme of the European Union.



## 2. Virtual Training Programme

### 2.1. Course structure

SOILdarity is a project funded by Horizon 2020 which has recently ended. Horizon Europe is the current Research and Innovation Framework Programme, running from 2021 to 2027. As a result, the rationale of the course is to consolidate the established knowledge in managing grants provided under H2020 which are still running and must be finalised, and at same time to share and spread insights on the novelties that Horizon Europe brought about.

The course analyses the financial and administrative rules of Horizon 2020 and Horizon Europe, taking into account the application problems of the universities, research organizations, in order to provide participants with operational tools to effectively manage the projects and processes included in them.

For each category of cost will also be illustrated the financial discipline of Horizon Europe (making appropriate comparisons with the Horizon 2020) addressing the most problematic issues derived from concrete cases and illustrating practical solutions that allow their resolution in accordance with the financial rules of the program and national legislation in force.

Considering the solid background of some of the administrative senior staff members in FC.ID, the course will be adopting a hand-on approach and will be very practice-oriented.

The course will be made up of **three modules**. The content of this training activity is the following:

#### 1. Internal organisation, communication between departments or individual researchers - Overall approach to EU funding:

- “horizon scanning”, i.e. the continuous process of information gathering based on monitoring of sources of funding
- Flexible Research and Innovation Governance system within research organisations
- Establishment of communication framework between research departments and individual researchers
- Destinations and pathways to impact under Horizon Europe
- Data management plan, Ethics
- Communication, dissemination and open science in Horizon Europe

#### 2. Administrative information required during the preparation phase of the proposal, Consortium Agreement and Grant Agreement preparation:

- Introduction to Horizon Europe and to its structure
- Grant Agreement contents
- Budgeting principles, personnel and purchasing costs, subcontracting and other cost categories, taking into account the comparison with Horizon 2020
- Ineligible costs
- the participation of Third Parties in project activities
- Intellectual property and the new discipline on Open Access



- Evaluation checks

### **3. Pre-financing and Upfront Payment, Kick-Off, interim and final payments; Administrative management of the project, reporting and reviews:**

- Payments
- The principles of reporting
- The reporting of personnel costs in Horizon 2020 and Horizon Europe (making the necessary comparisons with previous programming):
- Sub-contracting: critical issues and application solutions
- The management of conflicts of interest within the framework program
- The instruments of unit cost and lump sum

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At the end of training modules 1 and 2, the host will animate a question and answer (Q&A) session, which will be used to gather feedback from participants regarding other key points and administrative aspects, revolving around the research and innovation funding schemes of the European Union, they would like to explore further.

## **2.2. Location, Delivery date, duration**

**Location:** the programme will be made up of 3 web-based video conference that uses the internet to connect the host, i.e. who holds the course, to the audience of viewers and listeners. Hosts will show themselves speaking, share their computer screens for slideshows, and invite guests from other locations to co-host the seminars. The virtual activities will be animated through the supporting tools and material described in section 2.3.

<b>Delivery Dates:</b>	1 <sup>st</sup> module	30 November 2021
	2 <sup>nd</sup> module	27 January 2022
	3 <sup>rd</sup> module	23 June 2022

**Duration:** 14 hours.





## 2.3. Supporting tools and material

Typology/Tool	Website	Description
<b>Online Meeting-Tools</b>		
Zoom-Meeting	<a href="https://zoom.us/">https://zoom.us/</a>	Zoom is a cloud-based service which offers Meetings and Webinars and provides content sharing and video conferencing capability. You do not need a Zoom account to attend a Zoom meeting, only the host is required to have an account to enable the scheduling of meetings.
<b>File-Sharing-Tools</b>		
Google drive	<a href="https://www.google.com/drive/">https://www.google.com/drive/</a>	Platform to store and share documents. It works seamlessly with Microsoft Office.
We transfer	<a href="https://wetransfer.com/">https://wetransfer.com/</a>	WeTransfer is a cloud-based online platform designed to allow you to transfer different types of files for free to other users on the Internet. Tool used to share large files up to 2GB for free. No account needed. But only allows a maximum of 20 recipients.
<b>Collaboration-Tools</b>		
Mind mup	<a href="https://www.mindmup.com/">https://www.mindmup.com/</a>	Free online mind mapping tool.
Survey Monkey	<a href="https://www.surveymonkey.com/">https://www.surveymonkey.com/</a>	Free online survey tool to capture the voices and opinions of the people who matter most to you.
Mural	<a href="https://mural.co/">https://mural.co/</a>	Sticky notes & text Effortlessly add thoughts, ideas, and feedback for further action.
Miro	<a href="https://miro.com/">https://miro.com/</a>	Online collaborative whiteboarding platform to bring teams together, anytime, anywhere. Brainstorming, mindmapping, strategy and planning



## 2.5 Experts for the course

EUKNOW will be the main host of the training course. EUKNOW team of trainers will be made up of the following members.

**Giuseppe Saija** (Male) is the Director of EUKNOW. Giuseppe is an experienced coach and has a wide experience in training on the management of research and innovation processes. He has been training researchers and administrative staff of several private and public research entities since the launch the European R&I Framework Programme 6.

**Gabriele Quattrocchi** (Male) is an EU funding consultant since 2017. He has actively worked to support private and public entities in the management of the administrative burden resulting from their participation in H2020 projects.

**Zusepe Elias Zidda** (Male) works as a project manager for EU Research and Innovation projects. He works with multidisciplinary teams, has experience in organizing workshops, webinars and trainings for Research and Innovation projects.

UGENT will also support the training activities in the module 3. It will participate with **Saskia Vanden Broeck** (Female). She works as EU project manager at UGENT supporting researchers in coordinating and managing EU research projects. For the past 15 years, she has worked as a European Research Advisor at UGENT. Within this job, she fulfilled a variety of tasks of an organizational, administrative, financial or policy-supportive kind: Searching for funding opportunities, organizing information sessions, guiding researchers through the process of submitting proposals and also making sure all requirements of European funding programmes were well known.

